Attachment 1

PAST PERFORMANCE QUESTIONNAIRE

SOURCE SELECTION SENSITIVE INFORMATION

The contractor listed below is being considered for a contract award by the Eastern Acquisition Service Area, Boston Office. Your name has been provided as a customer reference regarding performance under a past contract with your agency/company. Your comments are considered "Source Selection Sensitive"; therefore, you are advised that your response will be safeguarded to the extent cited in the Acquisition Management System (AMS). Past performance evaluations will be released to, and discussed with, only those FAA personnel involved in the source selection process and the contractor whose performance is being evaluated during the period the information may be used to provide source selection information.

In order to maintain the integrity of the source selection process, respectfully request that you do not divulge the name of the contractor nor discuss your comments on this questionnaire with any other individuals.

Your completion of this form will be greatly appreciated. Upon completion, please e-mail to: **kevin.hart@faa.gov**.

Name of Offeror or *Team Member:

*If not the Prime Offeror, please state which team you are a member of.

Contract Information
(***Provided by Offeror***)

Name of Contractor:		Contract Number:	
Contract Title:		Contract Value:	
Type of Contract:		Period of Performance:	

The ratings below are supplied by the Contractor identified above, NOT the Offeror.

Performance Elements	Unsatisfactory 0	Poor 1	Fair 2	Good 3	Excellent 4	Outstanding 5
1. Quality of Product or Service						
2. Timeliness of Performance						
3. Cost Control						
4. Effectiveness of Management						
5. Initiative in Meeting Requirements						

6. Responsiveness to Technical Direction						
7. Responsiveness to Performance Problems						
8. Customer Satisfaction						
9. Overall Performance						

10. Remarks on outstanding performance

Provide data supporting this observation. You may continue on a separate sheet, if needed.

11. Remarks on unsatisfactory performance

Provide data supporting this observation. You may continue on a separate sheet, if needed.

12. Please identify any corporate affiliations with the Offeror.

13. Information provided by:

Name:	
Title:	
Mailing Address (Street and P.O. Box):	
City, State, and Zip Code:	
Telephone Number:	
Date Information Provided:	

Attachment 2

Technical Directive/Technical Work Plan Process

The following is the description of the Technical Directive/Technical Work Plan Process that will be followed during the execution of this contract.

The phrasing may be different from what the Contractors are accustomed to as the process described below has been modified from a former contract and tailored to these contracts.

TASKING

There will be two types of tasks: Type 1, which has a finite Statement of Work (SOW); and Type 2, which has a finite Period of Performance (PoP) and finite funding.

TYPE 1 TASKS

Type 1 tasks will typically be project type tasks. Examples include: Environmental Cleanup projects and Fire Life Safety (FLS) Upgrade projects. The PoP may be extended or the funding increased through the life of the project to ensure completion of the SOW. The SOW for these projects is fixed, though may be changed, provided the change logically falls within the realm of the work being performed. An example would be: Adding phases to a cleanup project where the presence of contamination is confirmed.

Some SOWs may group projects, such as multiple FLS Upgrade projects at various ATCTs. The location of such projects to be performed may be changed (name change) without changing the SOW of the task, as long as the total number of projects does not increase.

A Type 1 Task should be crafted initially with sufficient latitude to facilitate the completion of the desired task. Examples would be FST inspections or Hazardous Materials inventories to be conducted for all Districts within the Service Area. It is not possible to fund, or even execute, such work within an entire Service Area in one year. Therefore, incremental funding will be required. The work should be broken into logical phases with estimates on when funding will be received for each phase.

TYPE 2 TASKS

Type 2 tasks will typically be the Program Support type work. Examples include FLS Program Support performed by Fire Protection Engineers (FPE), Occupational Safety and Health (OSH) Program Support performed by Safety Professionals, or Environmental Compliance and Environmental Cleanup Program Support performed by Environmental Scientists and Specialists. Type 2 tasks will have a finite PoP and finite funding and the SOW will be defined by a list of potential types of activities that will be performed under the task. The activities will be clearly defined, but the quantity of each activity type will be determined throughout the execution of the task. The PoP may be rolled over to the following FY at the discretion of the CO if all funds were not utilized during the initial FY.

If an activity has to be performed that has not been identified in the SOW of the Type 2 task, that activity cannot be added to the existing task. A new task will have to be generated to cover the new activity.

A. The Technical Directive (TD) is used by the FAA to initiate the Tasking process:

1. FAA Contracting Officer's Technical Representative (COTR) will complete a TD (See Example 1) detailing the services to be provided, and an Independent Government Cost Estimate (IGCE) for those services. The TD and IGCE will be submitted to the FAA Contracting Officer (CO). The TD will identify the Program/Program Area for which the Task will be established. The Programs/Program Areas currently in use in the TD database are as follows (more Program Areas may be added at a later time as necessary):

   Programs/Program Areas:
   a. Energy
      i. Fuel Cell
      ii. Lighting Upgrade
      iii. Program Management
      iv. Training
      v. Other
   b. Environmental
      i. Cleanup
      ii. Compliance
      iii. Fuel Tank compliance
      iv. Program Management
      v. Training
   c. Occupational Safety and Health (OSH)
      i. Asbestos/Lead
      ii. Electrical Safety
      iii. Fall Protection
      iv. Fire Life Safety
      v. Health and Safety
      vi. Indoor Air Quality
      vii. Industrial Hygiene
      viii. Program Management
      ix. Radiation
      x. Training

2. The CO will review the TD and IGCE. The CO will email (or delegate P&R to email) the TD to the Contractor.

3. Upon receipt of the TD, the Contractor will review the Task requirements and ensure all requirements are understood.
   The Contractor will:
   a. Review the TD for clarity and understanding
   b. Develop a basic approach for performing the work
   c. Develop a list of questions, clarification points, or other considerations that should be discussed with FAA
   d. Schedule and conduct a meeting or teleconference with the FAA within three working days of receipt of the TD, if necessary. The purpose of the meeting will be to:
      i. Ensure understanding of the requirements discussed in the TD.
      ii. Provide overview of the approach for general consensus between the FAA and the Contractor.

e. Develop a Technical Work Plan (TWP) (See Example 2)

B. The TWP is the formal response/proposal process for the Contractor to respond to a TD.

1. The TWP shall:
   a. Provide the necessary level of detail to communicate and quantify activities and budget requirements
   b. Address the full SOW.
   c. Identify QA/QC procedures and resources to be utilized to complete the work.
   d. Be developed and submitted within five working days of receipt of the TD, unless significant follow-up of the TD is required or the task will entail considerable logistics (identifying sub-Contractors, getting cost estimates from third parties, etc)

2. The TWP is considered a contractual document and, therefore, must provide sufficient detail to accurately reflect the Contractor's approach for executing the work and to account for the associated costs.
   a. The Contractor will:
      i. Develop a detailed TWP in response to the TD detailing how requirements will be met. Sufficient detail of planned activities will be included to effectively monitor and control work activities.
      ii. Ensure all necessary coordination and communication requirements, check-in points, and milestones are accounted for within the TWP.
      iii. Include all assumptions regarding the performance of the work.
      iv. Identify all deliverable requirements (layout, format [hard copy, electronic], content, number of copies, and distribution).
      v. Develop a sheet to accompany the TWP entitled, "Technical Work Plan Proposed Budget," which provides an estimate for performance of the work as described in the TWP. The budget estimate will reflect the estimated cost to perform work. (See Example 3)
      vi. The Contractor Program Manager and Project Manager will review, sign, and submit the TWP to the FAA for review and approval. The TWP is submitted to the COTR.
      vii. Include signatures blocks for Concurrence by the COTR and Concurrence by the CO.

   b. The COTR will:
      i. Review the TWP and compare the budget with the IGCE. As applicable, develop a list of questions, changes, or required modification to the TWP and budget.
      ii. Changes or modifications requests will be communicated to the Contractor Project Manager.
      iii. Differences between the Contractor's budget and the FAA IGCE, and the Contractor's proposed approach will be discussed to redefine the work, as necessary.
      iv. Once the TWP is approved, the COTR will sign the Concurrence signature block on the Technical Work Plan Proposed Budget sheet, and send it to the CO.
      v. The CO will review the TWP and compare costs with the IGCE. The CO will sign the Concurrence.
      vi. The CO will retain originals and forward a copy of the Signed Technical Work Plan Proposed Budget sheet back to the COTR.

C. The Procurement Request (PR) is an internal FAA document which provides to the CO the SOW and funding information for the task

1. The COTR will have a PR generated and submitted to the CO to establish a Task Order.

2. The CO will issue a Purchase Order (PO) and the signed Technical Work Plan Proposed Budget sheet to the Contractor. This PO has an FAA Order Number (Task Order Number), which will be associated with TD Number.

3. Upon receipt of the PO, the Contractor can formally initiate the project. The Contractor must not begin any work on a Task until the PO has been received by the Contractor.

D. Tasking Requirements for Programmatic Tasks
   1. Representative Programmatic tasks include: compliance review, regulatory research, policy development, documentation review, etc. These tasks are typically short duration and are performed as needed at the request of the FAA as described below.
   2. Task Tracking Process:
      a. No task will be performed or time charged to the respective project number without direction or approval from the FAA.
      b. Requests by the FAA to perform a task should be writing, typically via email from the COTR. The tasking email will included the estimated Level of Effort (LOE), estimated Other Direct Costs (ODCs) and the desired completion date, if one has been established. All correspondence relative to a task should be copied to the CO, COTR, the Contractor's Program Manager, and the Contractors' Contract Manager. Internal FAA stakeholders may be included.
      c. The Program Manager will respond to the FAA's request via e-mail and summarize the request to ensure everyone has a good understanding of the task, confirm the estimated LOE and ODCs will be sufficient for the work, and agree to the completion date, or initiate discussions about changing the task requirements.
      d. Each month's activity will be incorporated into the monthly status report and copies of all e-mail exchanges will be attached as back-up.

E. Status Report Development

The Contractor shall prepare Status reports on a monthly basis. Status reports will be submitted to the FAA by the 15th of the month.

Monthly Status Reporting

For the Contracting Officer:

Please use a form such as that included at the end of this document for each Task (See Example 4). A brief discussion of activates performed under each Task will be included.

For the COTR, for purposes of evaluating invoices:

The contractors will provide monthly status reports. The status reports shall show the work broken down into Programs; e.g., OSH, Environmental, Energy Conservation.

The Programs shall be further broken down into Program Areas;

a. Energy
    i. Fuel Cell
    ii. Lighting Upgrade
    iii. Program Management
    iv. Training
    v. Other
b. Environmental
    i. Cleanup
    ii. Compliance
    iii. Fuel Tank compliance
    iv. Program Management
    v. Training
c. Occupational Safety and Health (OSH)
    i. Asbestos/Lead
    ii. Electrical Safety
    iii. Fall Protection
    iv. Fire Life Safety
    v. Health and Safety
    vi. Indoor Air Quality
    vii. Industrial Hygiene
    viii. Program Management
    ix. Radiation
    x. Training

The report shall provide a brief description of the individual taskings or project titles, an identification number for each task (a TD number or a Contractor-developed number which is tied back to a TD number), total funding per task, monthly charges per task, cumulative charges per task, funds remaining per task, and percent expended per task. Provide a brief description of work performed (accomplishments) per task, forecast of work to be performed in next reporting period, and estimated percent complete or estimated completion date.

The summaries for each Program Area shall include: the Labor Category; name of employee; hours worked; and identify the subcontractor, as appropriate. The summaries will include ODCs; e.g., Travel (provide name, dates of travel, destination, purpose of travel, and cost), reproduction costs, shipping, equipment, materials, services provided by others.

The report shall provide a brief description of work performed for LOE by one or more employees exceeding 16 hours per task for the reporting period.

F. Project Financial Tracking

Formally report the financial status via e-mail to the FAA when the following thresholds have been reached:

1. For small, short term projects, other than Programmatic tasks provide notification to FAA when 50% of allocated funds have been expended. Include an estimate to completion (how much funding or LOE is required to complete) and whether existing funds are sufficient to complete. The Contractor will show on the Monthly Status Report when 50% of funds have been expended.
2. For larger projects, provide notification to the FAA when 70% of project funds have been expended. Include an estimate to completion (how much funding or LOE is required to complete) and whether existing funds are sufficient to

complete projects. The Contractor will show on the Monthly Status Report when 70% of funds have been expended.

3. When 90% of project funds have been expended, stop work until all costs are fully accounted for by the Contractor (subcontractors, travel, and ODCs). The Contractor will show on the Monthly Status Report when 90% of funds have been expended. At 90% complete the Contactor shall coordinate with the FAA and plan on how to proceed shall be developed.

G. Documentation of Changes
    1. Changes to a Task Order
        a. The Contractor will promptly notify the FAA in writing of any conditions or changes in scope, cost, or period of performance differing from those indicated in the approved TWP.
        b. Only the CO can modify the Task Order by issuing to the Contractor a PO detailing the modifications.
        c. The Contractor will not initiate any changes in scope, cost, or PoP of a Task Order without prior approval from the CO.
            i. Email authorizations to proceed must be followed up with a PO from the CO detailing the modification.
            ii. All costs (labor, ODCs, travel) associated with the modification must be tracked and incorporated into a formal Change Order from the Contractor as soon as practical.
    2. Changes to a tasking which does not change the Task Order
        a. The COTR may request a change to a tasking that was initiated via email, which does not change the scope, cost, or PoP of the Task Order. All such FAA initiated change requests must be in writing, typically email.
        b. The COTR has the authority to approve a change to a tasking which does not change the scope, cost, or PoP of the Task Order.

H. Change Tracking and Change Order Development
    1. All changes to tasks and modifications to Task Orders shall be documented regardless if they result in an additional cost or adjustment in schedule. Changes and modifications include, but are not limited to the following:
        a. Variances from the SOW in the approved TWP.
        b. Modifications and/or refinements occurring during the course of the work
    2. During the course of a task, the Contractor will track any and all decisions that may impact the scope of a task.
    3. Any and all changes in scope, PoP, and/or cost which are requested by the FAA and are not included in the SOW of the approved TWP, or are a result of unique site conditions will require a Modification to the Task Order.

Attachment 3

Labor Categories

Labor Category	Degree and Experience	Provide Pricing for Labor Categories
Program Manager	Ph.D. and 4 years experience; **OR** Masters degree and 6 years experience; **OR** Bachelors degree and 8 years experience; **OR** High School Diploma and 12 years experience	
Project Manager	Ph.D. and 4 years experience; **OR** Masters degree and 6 years experience; **OR** Bachelors degree and 9 years experience; **OR** High School Diploma and 12 years experience	
Clerical	High School Diploma and 2 years experience	
Database Management Specialist	High School Diploma and 4 years experience	
Database Management Technician	High School Diploma and 2 years experience	
Cad Specialist	High School Diploma and 4 years experience	
CAD Technician	High School Diploma and 2 years experience	
Research Specialist	High School Diploma and 4 years experience	
Quality Assurance Specialist	Bachelors degree and 2 years experience; **OR** High School Diploma and 6 years	
Training Professional	Ph.D. and 2 years experience; **OR** Masters degree and 4 years experience; **OR** Bachelors degree and 7 years experience; **OR** High School Diploma and 10 years experience	
Geologist	Bachelors degree and 2 years experience; **OR** High School Diploma and 6 years experience	
Senior Fire Protection Professional	Ph.D. and 8 years experience; **OR** Masters degree and 10 years experience; **OR** Bachelors and 14 years experience. **Fire Protection Engineer License required.**	
Junior Fire Protection Professional	Masters degree and 2 years experience; **OR** Bachelors and 4 years experience. **Fire Protection Engineer License required.**	
Senior Technical Professional	Ph.D. and 6 years experience; **OR** Masters degree and 8 years experience; **OR** Bachelors degree and 10 years experience; **OR** High School Diploma and 15 years experience	
Energy Management Specialist	Masters degree and 2 years experience; **OR** Bachelors degree and 4 years experience; **OR** High School Diploma and 8 years experience	

Labor Category	Degree and Experience	Provide Pricing for Labor Categories
Field Technician	High School Diploma and 2 years experience	
Senior Safety Professional	Ph.D. and 2 years experience; **OR** Masters degree and 4 years experience; **OR** Bachelors degree and 6 years experience; **OR** High School Diploma and 10 years experience	
Junior Safety Professional	Ph.D. and 1 years experience; **OR** Masters degree and 2 years experience; **OR** Bachelors degree and 4 years experience; **OR** High School Diploma and 8 years experience	
Senior Safety Technician	Masters degree and 1 years experience; **OR** Bachelors degree and 2 years experience; **OR** High School Diploma and 7 years experience	
Junior Safety Technician	Bachelors degree and 1 years experience; **OR** High School Diploma and 5 years experience	
Senior Environmental Professional	Ph.D. and 2 years experience; **OR** Masters degree and 4 years experience; **OR** Bachelors degree and 6 years experience; **OR** High School Diploma and 10 years experience	
Junior Environmental Professional	Ph.D. and 1 years experience; **OR** Masters degree and 2 years experience; **OR** Bachelors degree and 4 years experience; **OR** High School Diploma and 8 years experience	
Senior Environmental Technician	Masters degree and 1 years experience; **OR** Bachelors degree and 2 years experience; **OR** High School Diploma and 7 years experience	
Junior Environmental Technician	Bachelors degree and 1 years experience; **OR** High School Diploma and 5 years experience	

Note: If the Contractor has different labor rates for working at a government site versus working at a Contractor's site, it would be appropriate to submit those rates.

Labor Category Descriptions

Labor Category	Category Description
Program Manager	Performs program management functions of large, multi-discipline programs, projects, or assignments. Responsible for resources, technical direction, cost and schedule performance, and quality.
Project Manager	Provides leadership and management for environmental and/or occupational safety and health (EOSH) and other technical directives for a wide variety of program areas and supporting projects. Possesses a comprehensive view of functional requirements of programs and projects and provides senior functional leadership across one or more program areas. Develops approaches for multiple project execution and provides EOSH subject matter expertise to the program. Oversees development of deliverables, staffing, budgeting, cost estimating, and financial management.
Clerical	Provides general administrative and secretarial support, maintaining personnel and other files; prepares correspondence, schedules and coordinates travel.
Database Management Specialist	Provides all activities related to the administration of computerized databases including identifying long term database requirements, designs, and content. Designs and creates databases for program use.
Database Management Technician	Performs data entry via databases supporting the program. Verifies data entered.
Cad Specialist	Develops CAD designs and drawings with supporting files for program use. Assists in the preparation of presentation graphics and supports the development of contract deliverables and reports by developing and updating graphic presentations to improve the quality and enhance the usability of these documents.
CAD Technician	Develops CAD designs and drawings with supporting files for program use.
Research Specialist	Plans, organizes, and conducts research in support of the program. Searches sources such as primary and secondary references and analyzes information and statistical data to prepare reports and studies for use by the program.
Quality Assurance Specialist	Develops and implements quality control methodologies to ensure compliance with quality assurance standards, guidelines, and procedures. Participates in formal and informal reviews throughout the program period of performance.
Training Professional	Assesses, designs, and conceptualizes training approaches, objectives, plans, tools, aids, curriculums, and other items related to training. Identifies the training approach and develops and revises training courses. Prepares training materials and trains staff by conducting classroom courses, workshops, and seminars.
Geologist	Supports drilling efforts and characterization activities. Understands soil characterization, hydrology, and ground water flow for investigative studies.
Senior Fire Protection Professional	Provides fire protection engineering expertise to the program. Provides technical direction and input for problem definition, approach methodology, analysis of findings, recommendations, and implementation for complex or extremely complex projects and assignments.
Junior Fire Protection Professional	Provides fire protection engineering consulting services to the program. Possesses a specialized view of functional requirements associated with fire protection engineering. Develops approaches for data gathering, analysis, and deliverable development. Develops solutions and strategies, and determines and presents alternative courses of action to optimize program effectiveness within the fire protection engineering area specialization.

Labor Category	Category Description
Senior Technical Professional	Provides recognized expertise in one or more of the EOSH technical programs. Provides technical and managerial direction and input for problem definition, approach methodology, analysis of findings, recommendations, and implementation for complex or extremely complex projects and assignments.
Energy Management Specialist	Provides compliance support focused on reducing energy and water consumption. Identifies requirements, applicable regulations, generates reports, and conducts energy audits.
Field Technician	Performs sampling, testing, and oversees installation of equipment or systems. May prepare charts and graphs for program reports and assists the program to support functions required in the field.
Senior Safety Professional	Provides occupational safety and health (OSH) consulting services to the program and supporting projects. Possesses a broad view of functional requirements of programs and projects and provides functional knowledge across one or more program areas. Develops approaches for task execution and provides OSH subject matter expertise to the program. Develops solutions and strategies, and determines and presents alternative courses of action to optimize program effectiveness.
Junior Safety Professional	Provides OSH consulting services to the program. Possesses a specialized view of functional requirements of the program and provides functional knowledge for one program area. Develops approaches for data gathering, analysis, and deliverable development. Develops solutions and strategies, and determines and presents alternative courses of action to optimize program effectiveness within the OSH program area specialization.
Senior Safety Technician	Provides OSH consulting services to the program and leads tasks. Leads data gathering, analysis, and deliverable development for tasks. Assists with developing approaches for data gathering, analysis, and deliverable development. Develops solutions and strategies, and determines and presents alternative courses of action to optimize program effectiveness within the OSH program area specialization.
Junior Safety Technician	Provides OSH consulting services to the program. Implements approaches for data gathering, analysis, and deliverable development. Assists in developing solutions for program deliverable completion. Assists with the development of policy, orders, and training documents.
Senior Environmental Professional	Provides environmental consulting services to the program and supporting projects. Possesses a broad view of functional requirements of programs and projects and provides functional knowledge across one or more program areas. Develops approaches for task execution and provides environmental subject matter expertise to the program. Develops solutions and strategies, and determines and presents alternative courses of action to optimize program effectiveness.
Junior Environmental Professional	Provides environmental consulting services to the program. Possesses a specialized view of functional requirements of the program and provides functional knowledge for one program area. Develops approaches for data gathering, analysis, and deliverable development. Develops solutions and strategies, and determines and presents alternative courses of action to optimize program effectiveness within the environmental program area specialization.
Senior Environmental Technician	Provides environmental consulting services to the program and leads tasks. Leads data gathering, analysis, and deliverable development for tasks. Assists with developing approaches for data gathering, analysis, and deliverable development. Develops solutions and strategies, and determines and presents alternative courses of action to optimize program effectiveness within the environmental program area specialization.
Junior Environmental Technician	Provides environmental consulting services to the program. Implements approaches for data gathering, analysis, and deliverable development. Assists in developing solutions for program deliverable completion. Assists with the development of policy, orders, and training documents.